

Utah National Guard  
Circular 350-51

Training

# Officer Candidate School

Headquarters  
Utah National Guard  
Draper, UT  
12 November 2008

**UNCLASSIFIED**

# ***SUMMARY of CHANGE***

UTNG CIR 350-51  
Officer Candidate School

This revised circular, dated 12 November 2008

- Transfers responsibility for receipt and quality assurance of OCS packets to ensure candidates meet eligibility stands and selection prerequisites from the G1 to the Recruiting & Retention (R&R) Command (Officer Strength Management).
- Outlines procedure for receipt and processing of OCS packets by the R&R Command (Officer Strength Management).
- Revises the duties of the G1 to include only processing of completed packets for Officer Candidates after completion of Phase 3 OCS for Federal Recognition and Commissioning.
- Revises the duties of the G3 to include publishing orders on OCS to attend resident phases of OCS.
- Establishes evaluation of a Traditional State OCS Program on a yearly basis through a survey conducted by R&R.
- Provides additional information of the purpose and program of instruction for Phase 0 (preparatory phase)
- Increases the options for Phases 1-3I from two training sites and times of the year (Ft. McClellan, AL (Jan-Mar) and Ft. Meade, SD (May-Jul)) to three sites (Ft. Meade, SD; Ft. McClellan and Reisterstown, MD/Ft. Indiantown Gap (Jul-Sep)). Phase 3 training formerly conducted at Ft. Lewis, WA for Candidates completing Phases 1-2 at Ft. Meade, SD has been eliminated. Candidates who complete Phases 1-2 at Ft. Meade shall also complete Phase 3 at that site.
- Establishes a deadline for receipt of completed/screened OCS packets by R&R (Officer Strength Management) to the RTI NLT 10 days prior to Phase 0.
- Per AR 600-8-19 (20 MAR 08), changes the rank for attendance to OCS from E6 to E5 and establishes procedures for promotion of Soldiers holding the rank of E1-E4. Candidates with the rank of E6 or E7 shall retain their current rank and shall not be reduced in rank.
- Includes a strong recommendation for prospective Aviation Branch Candidates to complete a flight physical.
- Requires candidates to possess a final SECRET security Clearance prior to commissioning.
- Changes the location to document the General Technical (GT) Score from the DA Form 2-1 to the Recruiter Eligibility Data Display (REDD) Report provided by the state R&R Bn.
- Changes the minimum educational requirement from 60 semester hours to 90 semester hours.
- Per AR 350-1 and AR 601-100 changes the maximum age for commissioning to 41 years 364 days.
- Soldiers who enlisted with the OCS Enlistment Option (O9S) are required to drill for a minimum of six months in an active reserve status prior to enrolling in and attending the OCS program.
- Establishes criteria for candidate's commitment to commissioning.
- Establishes criteria for waivers for civil convictions granted by The Adjutant General.

Headquarters  
Utah National Guard  
Draper, UT  
12 November 2008

**\*Utah National Guard  
Circular 350-51**

Expires 12 November 2010

**Regional Training Institute  
Officer Candidate School**

By Order of The Adjutant General:

LAWRENCE A. SCHMIDT  
COL, GS  
Chief of Staff

Official:

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CPT, GS  
Secretary to the General Staff

**History.** This publication is an administrative revision.

**Summary.** To provide administrative guidance for preparing and submitting an application for Officer Candidate School within the Utah Army National Guard.

**Applicability.** This publication applies to all UTARNG units and activities.

**Proponent.** The proponent of this

publication is UT-RTL.

**Suggested Improvements.** Users are invited to make suggestions for improvements on DA Form 2028 (Recommended Changes to Publications and Blank Forms) to the proponent.

**Distribution.** This publication is available in electronic media and is intended for distribution A.

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\*This publication supersedes UTNG Cir 350-51, dated 9 August 2006.

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## 1. Purpose

The purpose of this publication is to outline policy, course prerequisites, eligibility requirements, and administrative procedures for enrollment and attendance at the Utah Army National Guard (UTARNG) Officer Candidate School (OCS).

## 2. References

Required and related publications and prescribed and referenced forms are listed in Appendix A.

## 3. General

The UTARNG OCS Program is conducted by the 2<sup>nd</sup> Battalion, 640<sup>th</sup> Regiment, Regional Training Institute (RTI) at Camp Williams, Utah. The purpose of OCS is to develop the leadership and professional skills of candidates to prepare them for appointment as second lieutenants in the U.S. Army and to produce quality commissioned officers for effective service in the UTARNG. The OCS Program follows the Program of Instruction (POI) and Course Management Plan (CMP) established by the U.S. Army Infantry School (USAIS), and is fully accredited. Officers commissioned from the UTARNG OCS Program are federally recognized as officers in the United States Army.

## 4. Responsibilities

a. The Adjutant General (TAG) is responsible for establishing the OCS Program and overseeing its overall administration. TAG, in coordination with the RTI Commander, shall ensure training is conducted IAW the standards and provisions directed by the USAIS, the Army School System (TASS), and the U.S. Army Training and Doctrine Command (TRADOC).

b. 640<sup>th</sup> Regiment (RTI).

(1) Scheduling and conducting OCS orientation and training IAW the standards and provisions of the Active Component (AC) proponent school (USAIS).

(2) Conducting final showdown of candidate's organizational clothing and individual equipment (OCIE) and ensuring logistical preparedness for "Fast Track" training.

(3) Receive OCS application packets from Recruiting and Retention (R&R) for review. Prepare acceptance letter into OCS Program and send to R&R with CC copy to MACOM and Unit Commander. Send OCS application packets back to R&R when candidate completes Phase 3.

(4) Evaluating candidate leadership.

(5) Determining the candidate's suitability for appointment to officer status. RTI Commander reserves the right to deny candidates to continue with further training phases based on failure to attain standards, (i.e. APFT, HT/WT, swim test failure, substandard leadership characteristics, etc.). The RTI shall notify G3 schools on non-recommended Soldiers and the G3 orders shall not process for resident phases of OCS.

(6) Relieving candidates from the course, if required.

(7) Recommending candidates who successfully complete prescribed OCS training for commissioning.

(8) Notifying units of successful completion of IDT Phase 0 (MUTA) sessions so units can correctly process Soldiers for IDT pay.

c. Recruiting & Retention Command (Officer Strength Management)

(1) Screening OCS application packets to ensure candidates meet OCS eligibility standards and selection prerequisites.

(2) Notifying the RTI commander and unit commanders of qualified candidates.

(3) Receive an acceptance letter from the RTI and send draft OCS application packet to the RTI prior to the first phase 0 IDT drill.

(4) Receive, prepare and process commissioning packets after completion of OCS training.

(5) Send completed OCS application packets to G1 for commissioning.

d. G1.

(1) After completion of phase 3, receive completed OCS application packet from R&R Officer Strength Management.

(2) Review and send completed packet to the state Federal Recognition board for commissioning.

(3) Once approved send completed packet to NGB for commissioning. Notify unit commanders, RTI and the R&R Officer Strength Management on candidates commissioning date.

e. G3.

(1) Responsible for overall training, operations and funding resources of the OCS Program.

(2) Publish orders on OCS candidates to attend resident phases of OCS.

f. Major Command (MACOM) commanders are responsible for:

(1) Promoting the OCS Program throughout their subordinate organizations.

(2) Ensuring only the most qualified applicants are recommended for OCS training.

(3) Ensuring OCS application packets are satisfactorily prepared by subordinate units and forwarded through the chain of command in a timely manner.

(4) Ensuring all candidate administration requirements are satisfied and that OCS application packets are prepared for processing before established deadlines.

g. Unit commanders are responsible for:

(1) Giving maximum publicity to the OCS Program and emphasizing the opportunities offered for upward mobility and service as a commissioned officer.

(2) Identifying enlisted personnel and warrant officers as potential officer candidates and encouraging them to apply for OCS if they:

(a) Appear well motivated and demonstrate outstanding potential for leadership in positions of increasing responsibility.

- (b) Possess the qualities desired of a commissioned officer.
- (c) Meet the eligibility requirements.
- (3) Coordinating and conducting screening boards and selecting potential candidates.
- (4) Ensuring OCS application packets are completed and submitted in a timely manner.
- (5) Conducting initial showdown of candidate's OCIE to ensure logistical preparedness for OCS.
- (6) Processing, accounting for, and controlling OCS application packets and applicants. Forward packets to R&R Officer Strength Management through the chain of command.
- (7) Ensuring pay (split training certificates), administrative actions, ATRRS RFO input, travel, and logistical requirements are met.

## 5. Program of Instruction

a. The RTI is authorized to conduct a traditional State OCS Program when sufficient numbers of interested candidates warrant the training. The traditional State OCS Program consists of approximately 18 months of training that includes 12-15 Inactive Duty Training (IDT) periods and two Annual Training (AT) periods. The need for this program shall be evaluated annually through a survey by R&R. On approval, OCS candidates may also be given the option to complete Phase 2 OCS (IDT) through the OCS Program of another state. Approval for this option shall be done on a yearly basis and is dependent on yearly funding available.

b. The Utah National Guard offers a consolidated "Fast Track" program two or three times each training year for eligible applicants. The "Fast Track" POI contains a designated number of hours of military instruction that closely parallels the Resident/Federal OCS Program conducted at the USAIS. All academic subjects are mandatory unless otherwise identified.

c. Each "Fast Track" class is comprised of a preparatory phase (Phase 0) and three training phases (Phases 1 - 3). Phase 0 is conducted at Camp Williams, UT in IDT Status. Phase 1 - 3 is conducted at one of the following RTI's on various dates throughout the year: Ft. Meade, SD; Ft. McClellan, AL; and Reisterstown, MD/Ft. Indiantown Gap, PA. For dates and times of Phase 0 and Phases 1-3 visit the RTI's website at [www.ut.ngb.army.mil/ut640rti/](http://www.ut.ngb.army.mil/ut640rti/).

(1) Phase 0.

(a) One OCS orientation meeting usually the month prior to the start of Phase 0. The OCS Orientation brief is designed to inform interested Soldiers on the procedures and expectations of the OCS Program. Interested Soldiers shall be informed on the eligibility requirements for OCS and be given all possible options for OCS enrollment. This is usually done as a split train and units should make the necessary arrangements to insure their Soldiers are coded and submitted for pay appropriately.

(b) Three IDT periods designed to prepare prospective candidates to succeed in subsequent OCS training phases. This phase includes program orientation, administrative preparation, basic Soldier skills instruction, leadership assessment, drill and ceremonies, physical fitness, swim test assessment, 5-mile ruck march, and barracks preparation and inspection.

(2) Phase 1. One 15-day AT period that focuses on leadership at the individual, squad, and platoon level. Candidates receive training under high stress conditions in land navigation and various other military subjects. Candidates begin Phase 1 in *OCS Basic Status* which requires a climate of strict discipline as the cadre establish OCS standards and expect candidates to meet these standards. Candidates train under extremely demanding mental and physical conditions.

(3) Phase 2. One 28-day Active Duty Training (ADT) period that focuses on leadership at the individual, squad, platoon, and company levels. This phase is characterized by increased TAC officer teaching and a slight reduction in stress. Candidates continue to perfect the skills learned in basic phase and strive for tactical and small unit leadership skills and confidence. Candidates assume additional responsibilities designed to refine their leadership skills through additional challenges of maintaining a completely functional student chain of command. The OCS class enters Phase 2 in *Basic Status* and progresses, at the discretion of the TAC Staff, through *Intermediate Status* to *Senior Status*. Progression of officer candidate status is not automatic, but rather is performance based and may be revoked at any time.

(4) Phase 3.

(a) One 15-day ADT period that focuses on tactical operations and field leadership training at the individual, squad, platoon and company levels. Candidates are typically in senior status throughout this phase and continue to polish leadership skills to prepare themselves for commissioning. The function of the TAC Officer evolves to that of a teacher, mentor, and role model. Phase 3 constitutes the final refining process of the candidate's training to ultimately prepare him/her to function successfully in the officer environment.

(b) Upon completion of Phase 3, candidates typically return to Utah for commissioning.

(c) Leadership Assessment and Evaluation is conducted in accordance with standards established in the USAIS OCS POI. Methods of leadership development include discipline, high standards of deportment and conduct, exacting manner of performance, frequent and effective counseling, continuous observation, correction, and evaluation.

## 6. Eligibility

Enlisted members and warrant officers who apply for the OCS Program must meet the qualifications for Federal Recognition as prescribed in AR 350-51, NGB Pamphlet 350-51, NGR 600-100, and applicable guidance. In addition, officer candidates must meet all application and selection prerequisites listed in paragraphs 9 thru 19 below prior to scheduled orientation drills.

## 7. Application Procedures

a. Each applicant must be recommended by his/her company and battalion (or other, as appropriate) commanders. At a minimum, each battalion must establish a Screening Board to interview (in-person) each applicant desiring acceptance into the OCS Program. The membership of this board shall be determined by battalion leaders. The board must make an assessment of each applicant's suitability for service as a commissioned officer. The board shall take into consideration the individual's

maturity, leadership potential, military bearing, physical fitness, ability to clearly express himself/herself verbally and in writing, and motivation to become an officer. Each battalion is free to decide how to best interview OCS applicants as long as the minimums stated in this regulation are met.

b. Once approved by the unit/battalion board, each individual desiring admission into the OCS Program must submit an application packet containing all items listed in Appendix B of this publication through the unit to the R&R Officer Strength Management Office. It is the individual Soldier's responsibility to submit a complete packet containing all required documentation.

c. Application packets are accepted at any time; however, depending on when the application packet is received determines which OCS options are available for that student. Application packets must be prepared by the candidate and his/her unit of assignment and forwarded through the chain of command to the State R&R for final screening at least 30 days prior to the start of the desired Phase 0. Each higher headquarters shall review OCS application packets for quality and completeness in a timely manner before forwarding for processing. Each application shall be submitted via transmittal letter (TL) to ensure tracking and accountability. The applicant's unit of assignment should retain a copy of the signed TL and track the OCS application packet until final eligibility is determined by the G1.

d. The State R&R Officer Strength Management shall screen OCS application packets immediately upon receipt. Once R&R determines that a Soldier is eligible for OCS, they shall notify the unit and forward the application packet to the RTI no later than 10 days prior to the start of Phase 0. The RTI shall verify through the OCS application packet that the Candidate meets all OCS prerequisites, enroll the candidate into Phase 0, and produce an acceptance memorandum to the Candidates unit and the G1. Candidates should have a completed OCS application packet prior to starting Phase 0. If the application packet is not complete by the end of the 2<sup>nd</sup> drill of Phase 0, the Candidate shall be withdrawn from the program.

## **8. Payroll Procedures**

Candidates shall remain on the payroll of their unit, and shall not be attached to the 640<sup>th</sup> RTI. The candidate's unit of assignment is responsible for preparing split-training certificates that correspond with published OCS Phase 0 training dates and for processing their candidate's monthly drill pay in a timely manner. The RTI shall verify each candidate's attendance at Phase 0 drills.

## **9. Rank**

As per AR 600-8-19 (20 MAR 08), Soldiers shall be promoted to E5 (SGT), with a title of Candidate, 1 day before they enter candidate status upon enrollment in ARNGUS State Officer Candidate School. Officer candidates attending OCS must hold a rank of E5 (SGT) or higher. If not already an E5, Soldiers must be administratively advanced to E5 by their unit of assignment upon acceptance into Phase 0 with the DOR 1 day before the first Phase 0 starts. Individuals who fail to successfully complete the course shall be administratively reduced to the rank held before attendance in the OCS Program. Advancement and reduction (if necessary) are the responsibility of the Soldier's unit. The following outlines the actions that should be taken to promote a Soldier to E5:

- a. If Soldier is not an E5, send a promotion PAR to accomplish the following actions.
  - (1) On the day prior to attending OCS Phase 0, promote to E5 as per AR 600-8-19 Para 7-15b.
  - (2) Award the PMOS of 09S3O as per NGR 600-200 Para 2-12a(5). (Move the current PMOS to SMOS and the SMOS to AMOS).
  - (3) Change the position excess code to 999T as Soldiers are non-deployable while attending an officer commissioning program.
  - (4) In the block 'Promotion Control Number': put "Candidate"
  - (5) In the block 'Authorized UIC/Para/Line:' Move the Soldier into an officer position with DPOS 09S3O. (If the Soldier changes unit, a transfer order is required).

\* All actions are requested with the PAR for promotion.

\* If the Soldier drops from the OCS Program all actions are reversed and the Soldier returns to the rank and position held prior to attending OCS.

- b. If the Soldier is an E5, request an MOS PAR to accomplish the actions of sub paragraph (2) through (5) above
- c. If the Soldier is an E6 or E7 the Soldier retains that rank. Request an MOS PAR as per the previous paragraph awarding the PMOS of 09S3O or 09S4O.

## **10. Medical**

a. All Soldiers must be medically qualified to participate in OCS training and later commissioning. OCS applicants must be medically qualified IAW the procurement fitness standards identified in chapters 2 and 7 of AR 40-501 prior to attendance at Phase 1 resident Phase.

b. Officer Candidates must have completed a Chapter 2 physical within two years of the projected date of commissioning. If the physical shall be more than one year old at time of commissioning, then an updated Periodic Health Assessment (PHA) or Annual Medical Certificate must accompany the completed physical. Physicals must be signed by a physician and have the HIV results attached to be considered complete.

c. All medical examinations must be recorded on DD 2808 (Report of Medical Examination) and DD 2807-1 (Report of Medical History) and include the following:

- (1) A negative HIV screening test not older than 1 year. Physicals must include the results of the HIV test.
- (2) A physical profile serial (PULHES) of at least 222221. This requirement may not be waived.
- (3) DNA on file with MEDPROS or provide a DNA specimen sample.

- d. If required, the unit commander/personnel manager shall schedule required medical examinations.
- e. Medical waivers for disqualifying conditions shall be forwarded to the ARNG State Surgeon for evaluation and approval. Questionable or controversial cases shall be sent to the NGB Surgeon (NGB-ARS) for a final determination. TAG may allow a Soldier to enroll in OCS while waiting for a medical waiver approval. However, entrance into training does not constitute grounds for continuation in the OCS Program in the event the medical waiver is disapproved.

## **11. Security Clearance**

Applicants must possess, as a minimum, an interim SECRET security clearance to be accepted into the OCS Program. Candidates must possess a final security clearance prior to commissioning. The only accepted verification of clearance is a JCAVS Person Summary (JPAS Printout) from the State Personnel Security Manager (State G2). This verification must be included in the application packet.

## **12. Physical Fitness**

- a. Candidates must pass the Army Physical Fitness Test (APFT) as per FM 21-20 prior to enrollment. All candidates shall take a “for record” APFT during Phase 0. Applicants cannot possess a profile that limits taking the APFT or restricts full participation in any vigorous training.
- b. Candidates must meet height/weight standards IAW AR 600-9 (including body fat limitations). This requirement may not be waived.
- c. Individuals who do not meet the APFT or height/weight minimum standards at any time during the course may be dismissed from the course prior to graduation. These Soldiers shall return to their unit and may choose to reapply for a future OCS class.

## **13. Test Score**

Applicants must achieve a General Technical (GT) Score of 110 or higher on the Armed Forces Vocational Aptitude Battery (ASVAB). This requirement may not be waived. The test score is documented on the Recruiter Eligibility Data Display (REDD) Report provided by the State R&R Bn.

## **14. Education**

- a. Applicants must be a high school graduate (or equivalent). They must have a minimum of 90 semester hours prior to beginning of Phase 0. College credits must be documented on an official (not marked “issued to student”) transcript from an accredited college or university. Transcripts must be mailed directly from the college to the State R&R Bn and must arrive in time to be reviewed with the applicant’s packet. A packet shall not be considered complete without a valid transcript.
- b. Demonstrated proficiency in the English language is a prerequisite for OCS. Individuals for whom English is not a native language must achieve a score of 80 or higher on the English Comprehensive Level Test (ECLT). These individuals shall also be interviewed to ensure they possess sufficient oral and written skills to complete the course. Candidates must understand technical information presented in the course, and be able to present such information to others.

## **15. Age**

- a. The minimum age for enrollment in the program is 18 years.
- b. The maximum age for commissioning is 41 years 364 days. At this time, waivers are no longer required.

## **16. Prior Military Training**

- a. Applicants must have completed Basic Combat Training (BCT) and Advanced Individual Training (AIT) with an active component of the U.S. Armed Forces. In addition, applicants must have served a minimum of one year in active reserve status in the ARNG and performed at least one annual training period with their assigned unit.
- b. Exception to the prior military training requirement is granted for Soldiers who enlisted with *OCS Enlistment Option* (09S). These Soldiers must have successfully completed BCT, and have drilled a minimum of six months in active reserve status, but are granted exception to the other requirements. The six month requirement is meant to give new Soldiers in the Army time to adjust and prepare for the rigorous responsibilities required by the OCS Program. This requirement may be waived with a memorandum from his/her battalion commander stating that the Soldier is mentally and physically prepared to accept the responsibilities of being a commissioned officer in the Utah Army National Guard.
- c. OCS Enlistment Option Soldiers (09S) must provide a copy of their DD Form 214 or DD Form 220 showing completion of BCT along with a copy of their OCS Enlistment Paperwork (DD Form 1966) as part of their OCS application packet. OCS Enlistment Option Soldiers who do not complete OCS shall be immediately scheduled to attend AIT.

## **17. Service Requirements**

- a. Applicants must have a minimum of two years remaining on their enlistment contract after graduation from OCS. If necessary, he/she must extend the contract. Extensions must be completed prior to applying. Applicants with insufficient time remaining on their contract shall not be admitted into the program.
- b. All Soldiers must be able to complete 20 years of creditable service as a commissioning requirement.

## **18. Candidate Commitment to Commissioning**

- a. Candidates who have been accepted to the OCS Program at the 640<sup>th</sup> Regiment must be committed to complete the program and be commissioned as soon as possible.



- b. Once a candidate has selected a school and set of dates to complete OCS, they shall not be allowed to reschedule their OCS dates without a memorandum signed by their battalion commander.
- c. If a candidate fails to commission within two years of beginning the program, a documented counseling done by the MACOM commander shall be required for acceptance back into the RTI's OCS Program.

## **19. Clothing and Equipment**

a. Unit commanders and supply sergeants shall conduct individual clothing and OCIE showdown to ensure candidates possess a complete initial issue of serviceable clothing as outlined in AR 670-1 and AR 700-84, and all items listed in Appendix F of this publication. This action must be completed upon submission of the OCS application packet to the State R&R Bn.

b. Upon notification from the State R&R Bn of the applicant's acceptance into the OCS program, the Soldier's unit Supply Sergeant shall order a supplemental clothing allowance as authorized by CTA 50-900, Table 3 from the Central Clothing Distribution Center (CCDF). Unit Supply Sergeants must annotate "OCS CANDIDATE" on the requisition to ensure proper quantities of issue by the United States Property and Fiscal Office (USP&FO). The supplemental clothing allowance must be received and issued to the Soldier no later than the last drill prior to the start date of OCS Phase 1. If this clothing has not been received from the CCDF prior to the start date of Phase 1, the candidate must provide the 640<sup>th</sup> Regiment OCS commander a copy of the request to validate that it was submitted.

c. Any OCIE items listed in Appendix C of this publication that are not already in the candidate's possession must be ordered by the unit through the State Central Issue Facility (CIF). The candidate must have all OCIE items listed in Appendix C no later than the last drill prior to the start date of Phase 1.

d. OCIE procedures are prescribed by the UTNG CIF Customer Handbook, section 9.6, page 58. This publication can be found on the State CIF home page.

## **20. Criteria Waivers**

Waivers may be needed for medical reasons, civil convictions or various other exceptions to requirements. All requests for authorized waivers and/or exceptions to policy, regardless of nature, are considered on a case-by-case basis. Submittal does not constitute approval. Waivers may be approved on an individual basis and do not create precedence for all cases. Waivers must be approved prior to submitting an application for OCS. Applicants must ensure that documentation of approved waivers is included in the application packet. Packets without approved waivers shall not be accepted. A sample request for a waiver is shown at figure 20-1.

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## UNIT LETTERHEAD

Office Symbol

Date

MEMORANDUM FOR TAG, UTARNG (UT-G1-O), P.O. Box 1776, Draper, Utah 84020-1776

SUBJECT: Request for Waiver - Prior Conviction

1. Request a waiver of a Prior Conviction is granted to: \_\_\_\_\_.
2. This individual's conduct and character, while a member of this unit, has been above reproach. He/she has demonstrated the potential to become a fine officer in the Utah Army National Guard.
3. Attached as enclosures are copies of the official court records, court action, judgment rendered and a statement of circumstances from the individual.

Encl  
as

JOHN A. DOE  
CPT, EN, UTARNG  
Commanding

**Figure 20-1: Sample: Prior Conviction Waiver**

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### **21. Who May Not Apply for OCS**

The following Soldiers are not qualified for enrollment into OCS and may not apply:

- a. Conscientious Objectors. This pertains to a person's willingness to bear arms and give full and unqualified service to the United States. A person who has been a conscientious objector must furnish an affidavit expressing abandonment of such beliefs and principles. When appropriate, the person must have demonstrated a change of views by subsequent military service.
- b. Persons determined as security risks under AR 604-10 and where selection would clearly not be in the best interest of national security.
- c. Persons who are, or have been, commissioned officers (except commissioned warrant officers) in any component of the U.S. Armed Forces.
- d. Persons who are under suspension of favorable personnel actions in national security cases or other investigations or proceedings (AR 600-8-2).
- e. Persons who are, or were, in an absent without leave (AWOL) or deserter status during the current term of appointment or enlistment.
- f. Persons who have a bar to reenlistment in effect under AR 140-111 or AR 601-280. Unit commanders must pay particular attention to Re-enlistment Eligibility (RE) codes 3 and 4 before selecting OCS candidates.
- g. Persons who have been released from AD and transferred to the ARNG with a character of service other than honorable.
- h. Persons who have been involuntarily released from AD, ADT, or initial active duty for training (IADT), during the current term of service under AR 135-178 or AR 635-200.

i. Persons who have criminal or juvenile court charges filed or pending against them by civil authorities. This includes persons who are released from the custody or restraint of a court under procedures that do not appear to completely dispose of the charge or charges. Examples of such releases are:

- (1) Release by the court following a plea of any type (including a plea of guilty or nolo contendere).
- (2) Release on probation without a verdict.
- (3) Release on a person's own recognizance.
- (4) Release following charges that are not placed on file.

(5) Any similar disposition, regardless of the technical name, that indicates that the person may remain subject to further judicial proceedings related to the charge. This basis for disqualification shall be considered removed if the official chiefly responsible for prosecuting the charges submits a signed statement indicating that under laws or current practices of jurisdiction, the applicant is not subject to further restraint, custody control, or prosecution by the authorities thereof. (The official may be a district attorney, the judge of the court involved, or a higher official of the jurisdiction concerned who has responsibility in connection with the case.)

j. Persons who have been adjudged juvenile offenders or who have a record of conviction by any type of military or civil court (excluding any convictions for minor traffic violations involving a fine or forfeiture of \$250 or less).

k. Waivers for civil convictions are granted by The Adjutant General on a case by case basis and must be submitted through proper channels to the G1. These candidates shall meet with either the AAG or G1 personally to discuss circumstances of the conviction and determine eligibility. Prior conviction waivers granted for reasons other than OCS shall not be accepted (See NGB-ARH Policy Memorandum #07-015). An example of a prior conviction waiver is located in Appendix B.

## **Appendix A References**

### **Section I Required Publications**

#### **AR 40-501**

Standards of Medical Fitness (Cited in para 10-a.)

#### **AR 135-178**

Enlisted Administrative Separations (Cited in para 21-h.)

#### **AR 140-111**

U.S. Army Reserve Enlistment Program (Cited in para Paragraph 12-f.)

#### **AR 350-51**

United States Army Officer Candidate School (Cited in para 6.)

#### **AR 600-8-2**

Suspension of Favorable Personnel Actions (Flags) (Cited in para 12-d.)

#### **AR 600-8-19**

Enlisted Promotions and Reductions (Cited in para 9, 9-a-1.)

#### **AR 600-9**

Army Weight Control Program (Cited in para 12-b.)

#### **AR 601-280**

Army Retention Program (Cited in para 12-f.)

#### **AR 635-200**

Active Duty Enlisted Administrative Separations (Cited in para 21-h.)

#### **FM 21-20**

Physical Fitness Training (Cited in para 12.)

#### **NGB Pamphlet 350-51**

Officer Candidate School (Cited in para 6.)

#### **NGR 600-100**

Commissioned Officers – Federal Recognition and Related Personnel Actions (Cited in para 6.)

### **Section II Related Publications**

A related publication is a source of additional information. The user does not have to read a related publication to understand the publication.

#### **NGR 600-200**

Enlisted Personnel Management and Fiscal Year (FY) Enlistment Criteria Memorandum (ECM)

#### **AR 670-1**

Wear and Appearance of Army Uniforms and Insignia

#### **AR 700-84**

Issue and Sale of Personal Clothing

#### **CTA 50-900**

Clothing and Individual Equipment

#### **AR 380-67**

The Department of the Army Personnel Security

#### **AR 140-111**

U.S. Army Reserve Reenlistment Program

**AR 635-200**

Active Duty Enlisted Administrative Separations

**Section III**

**Prescribed Forms**

This section contains no entries.

**Section IV**

**Referenced Forms**

This section contains no entries.

## **Appendix B**

### **OCS Application Packet**

An OCS application packet consists of the OCS Application Form (RTI Form 351a), OCS Application Checklist, and all allied forms and documents listed on the OCS Application Checklist. Administrators must ensure all supporting documentation is submitted in the order listed on the OCS Application Checklist. Administrators must also ensure that a Transmittal Letter (TL) accompanies the packet all the way from the unit level through appropriate chains of command until it reaches the State G1 (Officer Branch). An OCS Application Form and OCS Application Checklist are included in this appendix, along with sample requests for waivers. OCS application forms and important OCS information is also available at the following 640<sup>th</sup> Regiment (RTI) OCS website: <http://www.ut.ngb.army.mil/ut640rti/>.

#### **B-1. Utah National Guard OCS Application**

The OCS application has been revised and is now available on the RTI's website (also see figure B-1). The OCS application on the RTI's website is a fill-able form and must be signed in all four signature blocks with typed names of the signees.

#### **B-2. OCS Application Checklist**

Application documents shall be assembled and submitted in the order of the checklist (see figure B-2). All applications shall be in document protectors and placed in a protective document binder to ensure all documents stay protected and packets remain complete. Place an X in the space provided after completion of each action on the checklist. When completed, the applicant and unit administrators preparing the packet shall both sign and date in the space provided.

UTAH NATIONAL GUARD OCS APPLICATION				
1. Name (Last, First, MI)	2. Rank	3. DOR	4. SSN	5. Gender <input type="checkbox"/> Male <input type="checkbox"/> Female
6. Home Address		7. E-mail Address		10. Phone Numbers Home: Cell: Work:
		8. Age	9. Date of Birth	
11. Unit Name and Address		12. Unit Point of Contact Information Rank: Name: Phone Number: Email Address:		
13. Are you a U.S. Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No If no, Date requested:	14. Were you born outside the U.S.? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, in what country were you born?		15. Have you had a Chapter 2 Physical within the last year? <input type="checkbox"/> Yes <input type="checkbox"/> No Date of last Physical Exam:	
16. Do you have a current security clearance? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, what level? If no, what date did you request one?		17. Do you have a College Degree? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, what type? <input type="checkbox"/> AA <input type="checkbox"/> BA <input type="checkbox"/> BS <input type="checkbox"/> MA <input type="checkbox"/> Other If no, how many semester credits have you finished towards your degree? Name of College: City and State:		
18. Military Background Status: <input type="checkbox"/> M-Day (Traditional Drills) <input type="checkbox"/> Tech <input type="checkbox"/> AGR <input type="checkbox"/> OCS Enlistment Option (09S) Pay Entry Basic Date (PEBD): Total Years Military Service: Highest level of military education: Date of UTARNG Enlistment: ETS Date: Primary MOS:				
19. Were you ever rejected for military service or appointment as an officer? <input type="checkbox"/> Yes <input type="checkbox"/> No Have you ever been the subject of a military justice proceeding? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, attach the Record of Proceedings. Were you ever discharged under other than honorable conditions? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, what was the character of service on DD Form 214? Did a civil court ever convict you (for other than a minor traffic violation)? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, attach statement of incident including fine amount.				
20. Signature of Applicant		21. Signature of Unit Commander		
Date		Date		
Typed Name:		Typed Name:		
22. Signature of BN Commander		23. Signature of BDE/GRP Commander		
Date		Date		
Typed Name:		Typed Name:		

Figure B-1: Utah National Guard OCS Application

<b>NAME:</b>		<b>SSN:</b>		<b>UNIT:</b>
				<b>DATE:</b>
<b>ITEM</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>	<b>REMARKS</b>
<b>OCS APPLICATION</b>				Must be signed by immediate Commander, Battalion Commander, and BDE/GP Commander.
<b>APPLICATION CHECKLIST</b>				Check off items as they are included in the application packet. Must be signed by applicant and unit representative.
<b>LETTER OF INTENT FROM APPLICANT</b>				Subject: "Why I Want to Be an Army Officer". Must be hand-written by applicant on standard 8.5 x 11 lined paper.
<b>LETTER OF RECOMMENDATION</b>				Typed IAW Army correspondence standards. Must be signed by applicant's Unit Commander.
<b>OFFICIAL DA PHOTO</b>				Must be current within 1 year.
<b>COPY OF SOCIAL SECURITY CARD</b>				Self-explanatory
<b>BIRTH CERTIFICATE</b>				Baptism certificate is not acceptable. Full name and date of birth must be legible.
<b>DD Form 2808</b> Report of Medical Examination				Chapter 2 Commissioning Physical required. Must be dated within 1 year of appointment.
<b>DD Form 2807-1</b> Report of Medical Examination				Chapter 2 Commissioning Physical required. Must be dated within 1 year of appointment.
<b>COPY OF COLLEGE DIPLOMA</b> (If applicable)				From an accredited college or university. Must also possess a transcript that indicates a diploma was issued.
<b>OFFICIAL COLLEGE TRANSCRIPTS</b> Cannot be a copy				Must have 90 semester hours or equivalent completed. Must be mailed directly by the university to 640 <sup>th</sup> or R&R.
<b>COPY OF REDD REPORT</b> (With ASVAB scores) or other proof of GT score				GT score must be 110 or higher.
<b>COPY OF OCS OPTION ENLISTMENT PAPERS</b> (If applicable)				Ensure copy of enlistment and contract agreement are in the applicant's MPRJ and include in OCS application packet.
<b>DD FORM 220</b> (Active Duty Report) <b>or</b> <b>DD FORM 214</b> (Certificate of Release or Discharge from Active Duty) <b>or</b> <b>NGB FORM 22</b> (Report of Separation and Record of Service)				Verify all periods of active military service. Ensure reenlistment code of RE1. RE3 codes need to be expunged at DA level prior to enrollment. Must have proof of BCT/AIT completion. OCS Enlistment Option Soldiers must have waiver for AIT.
<b>JPAS PRINTOUT FROM STATE SECURITY MANAGER</b> Security Clearance Verification				Must possess SECRET clearance or INTERIM clearance by OCS graduation.
<b>RM 5247-R</b> Request for Security Determination				Only submit if Soldier has had previous clearance, but does not know the status of his/her secret clearance.
<b>REQUEST FOR PRIOR MORAL / CIVIL CONVICTIONS WAIVER</b> (If applicable)				Include a court document stating the disposition of the offense. Include completed NGB Form 62 signed through chain of command. Also include a memo from the Soldier concerning the offense.
<b>DA FORM 705</b> APFT Scorecard				Dated within the last 12 months.
<b>DA FORM 5500/5501-R</b> Body Fat Content Worksheet (If applicable)				Dated no earlier than most current DA Form 705.
<b>DA FORM 4836</b> Oath of Extension of Enlistment or Reenlistment <b>OR COPY OF PQR (PREFERRED)</b>				ETS Date no earlier than OCS graduation/commissioning date.
<b>PHOTOCOPY OF ID TAGS</b>				Verifies the Soldier has them.
<b>COPY OF ID CARD</b>				Expiration date not earlier than graduation/commissioning date.
<b>SUPPLEMENTAL CLOTHING ISSUE REQUEST</b>				Supplemental Clothing Allowance processed by parent unit supply. Include copy of printout of Central Clothing Distribution Facility (CCDF) Form 3. (Ref: CTA 50-900)

Figure B-2: OCS Application Checklist



## Appendix C

### Officer Appointment Checklist

Each candidate shall use the Officer Appointment Checklist (see figure C-1) to finalize the officer appointment process.

<b>NAME OF SOLDIER:</b>	
<b>TYPE OF APPOINTMENT:</b>	
<b>DATE:</b>	
<b>PERSONAL DOCUMENTS</b>	
	Birth Certificate
	SSN Card
	Marriage Certificate
	Other Dependent Status Documents
	Original College Transcripts ( <b>Not</b> "Issued to Student")
<b>PAY DOCUMENTS</b>	
	SF Form 1199a (Direct Deposit)
	Jumps Form 3685
	DA Form 5960 (N/A/ for Soldier's Without Dependents)
	SGLV Form 8286
	SGLV Form 8286a
	W-4 Form
	DD Form 2058 (State of Legal Residence)
	Current Home Address
<b>MILITARY DOCUMENTS</b>	
	Appointment Order and/or Discharge Order
	NGB Form 62E
	NGB Form 337 (Oath of Office)
	Current Physical or PHA (All Applicable Forms)
	DA Form 71 (If Applicable)
	Conditional Release (If Applicable)
	Source of Commissioning Documents
	Current PQR and/or ORB
	Security Determination Documents (Memo from State Personnel Security Manager)
	DD Form(s) 214
	NGB Form(s) 22
	DA Form(s) 1059 (Certificates of Training)
	Federal Recognition Order(s)
	Any other Pertinent Documents (ORB, etc.)
	DA Board Status (Non Select / Select)

**Figure C-1: Officer Appointment Checklist**

## **Appendix D**

### **Actions by Company or Similar Unit Commander**

1. Identify worthy candidates by personal interview, verify candidate meets eligibility requirements established in this circular, and consolidate required application documents as soon as possible.
2. If applicant has previously been dis-enrolled from an officer candidate-type training course, request DD Form 785 (Record of Dis-enrollment from Officer Candidate-Type Training).
3. Discuss the application and OCS Program with the applicant personally. The applicant must be clearly aware of the nature of OCS training and the responsibilities of a commissioned officer. Give the applicant additional responsibilities and opportunities for further development of leadership and physical conditioning.
4. Review application and allied documents for accuracy and completeness. Make any minor changes needed in the presence of the applicant. Ensure all deficiencies are resolved before forwarding the application.
5. Ensure applicant is capable of passing the APFT and meets HT/WT standards.
6. Submit an ATRRS application for all three phases of OCS through the proper channels.
7. Complete the packet according to Appendix B, OCS Application Checklist.
8. Conduct initial showdown of applicant's OCIE. Requisition clothing and equipment that the applicant needs through appropriate supply channels.
9. Upon notification of acceptance into OCS, and if candidate is below the rank of E5, administratively advance him/her to the rank of E5 prior to attendance at Phase 0.
10. Ensure candidate physically and logistically prepares to meet class suspense dates.

## **Appendix E**

### **Actions by Each Higher HQ (Battalion, Group/Brigade, MACOM)**

1. Review the OCS application packet for accuracy and completeness. Ensure all necessary waivers are forwarded to the appropriate agencies.
2. Process OCS application as soon as possible after it has been received from the unit and forward ATRRS applications.
3. Review the applicant's personnel files and the application to ensure the applicant meets all eligibility requirements and possesses the potential, motivation and aptitude to complete OCS.
4. Ensure that the applicant is aware of the nature of ARNG OCS training and the responsibilities of a commissioned officer.
5. Ensure applicant is capable of passing the APFT and meets HT/WT standards.
6. Forward completed OCS application packet through chain of command to R&R Officer Strength Management.

## **Appendix F**

### **OCS Phase 0 Packing List**

Each applicant shall be required to have items from the Phase 0 Packing List (see figure F-1) before attending the first day of training.

ITEM	QTY	X
IPFU, Shorts (No Substitute)	1	
IPFU, Shirt (No Substitute)	1	
IPFU, Sweat Pants (No Substitute)	1	
IPFU, Sweat Jacket (No Substitute)	1	
IPFU, Watch Cap, Black (No Substitute)	1	
IPFU, Shoes	1pair	
Bag, Duffel	1	
Bag, Laundry	1	
Belt, Trousers	1	
Boots, Combat	1	
Buckle, Belt Trousers, Black	1	
Cap, BDU/ACU	2	
Coat, BDU/ACU w/Rank	4	
Coat, Cold Weather, BDU/ACU w/liner	1	
Gloves, Insert (PR)	1	
Gloves, Leather (PR)	1	
Socks, Cushion Sole (PR)	5	
Trousers, BDU/ACU	4	
Undershirt, Brown (or Tan)	5	
Padlock	2	
Clothes Hangers	8	
Comb or Hair Brush	1	
Feminine Hygiene Items	As Nece ssary	
Lip Stick, Anti-chap	1	
Money	\$50 (Opt)	
Notebook	2	
Pens and Pencils	2	
Razors and Blades	2	
Shower Shoes	1	

ITEM	QTY	X
Soap	1	
Toothbrush	1	
Towels, Face and Bath	2	
Underwear	3	
Wash Cloth	2	
Watch, Wrist	1	
Belt, Pistol, Individual Equipment	1	
Canteen, Plastic, 1qt Water	2	
Canteen, Cover	2	
Case, First Aid w/ Pressure Bandage	1	
Case, Small Arms Ammo (M16)	2	
Compass, Lensatic w/ Case	1	
Cup, Water Canteen	1	
Entrenching Tool w/Cover	1	
Field Pack, w/ Frame LC1 (Med or Large)	1	
Flashlight	1	
Helmet, Kevlar w/Camo Cover and Band	1	
Overshoes, Vinyl	1	
Poncho	1	
Sleeping Bag	1	
Sleeping Mat	1	
Suspenders (LCE)	1	
<b>Equipment for Cold Weather Months (Oct-Apr)</b>		
Boots, Intermediate Cold	1	
Cap, Cold Weather (Pile Cap)	1	
Parka, Gortex	1	
Trousers, Gortex	1	
Underwear, Polypropylene (top and bottom)	1	

Figure F-1: OCS Phase 0 Packing List

## **Appendix G**

### **OCS Phase 1-3 Packing List**

For Packing list for Phases 1-3, see the appropriate OC Guide for the school where you plan to attend OCS.

Ft. McClellan, AL

<http://alguard.state.al.us/OCS/download.htm>

Ft. Meade, SD

<https://sdguard.ngb.army.mil/196rti/ocsbn/default.aspx>

Ft. Indiantown Gap, PA

<http://www.166th.state.pa.us/>

## **Glossary**

### **Section I Abbreviations**

**AAG**

Assistant Adjutant General

**AC**

Active Component

**ADT**

Active Duty Training

**AIT**

advanced individual training

**APFT**

Army Physical Fitness Test

**AR**

Army regulation

**ARNGUS**

Army National Guard of the United States

**ASVAB**

Armed Services Vocational Aptitude Battery

**AT**

Annual Training

**ATRRS**

Army Training Requirements & Resources System

**BCT**

Basic Combat Training

**CCDF**

Central Clothing Distribution Center

**CMP**

Course Management Plan

**DA**

Department of the Army

**ECLT**

English Comprehension Level Test

**GT**

General Technical Aptitude Test

**HQDA**

Headquarters, Department of the Army

**IDT**

Inactive Duty Training

**IN**

Infantry

**MACOM**

major Army command

**MPRJ**

Military Personnel Record Jacket

**NGB**

National Guard Bureau

**OCIE**

Organizational Clothing & Individual Equipment

**OCS**

Officer Candidate School

**ORB**

Officer Record Brief

**PHA**

Periodic Health Assessment

**PMOS**

primary military occupational specialty

**POI**

program of instruction

**PQR**

Personnel Qualification Record

**TAG**

The Adjutant General

**TL**

Transmittal Letter

**TRADOC**

U.S. Army Training and Doctrine Command

**USAIS**

United States Army Infantry School

**Section II****Terms****Applicant**

An eligible Active Army enlisted member or warrant officer who applies for enrollment in OCS. Members of the USAR and, where indicated, the ARNGUS, may also apply for OCS.

**Candidate**

A student who is enrolled in OCS.

**Chain of command**

Applicant's unit commander, intermediate commander, and major Army commander.

**Fast Track Officer Candidate School**

Consists of a Phase 0 (three month Inactive Duty Training (IDT) periods), followed by Phase 1 (15-day annual Training (AT) period), Phase 2 (28 day Active Duty for Training (ADT) period), and Phase 3 (15-day ADT period). Phase 1-3 can be completed sequentially.

**M-day**

The term used to designate a Traditional Guardsman (not a Military Technician or AGR).

**Officer Candidate School**

A 14-week course conducted at designated Army schools to train qualified persons to serve as commissioned officers in the U.S. Army.

**Traditional State OCS Program**

Consists of approximately 18 months of training (12-15 IDT periods, followed by two 15-day AT periods).

**Section III****Special Abbreviations and Terms**

This section contains no entries.

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